



# STATE OF NORTH DAKOTA

**PROJECTS SUPPLEMENTAL MANUAL -  
ANALYZING PROJECTS ONLINE**

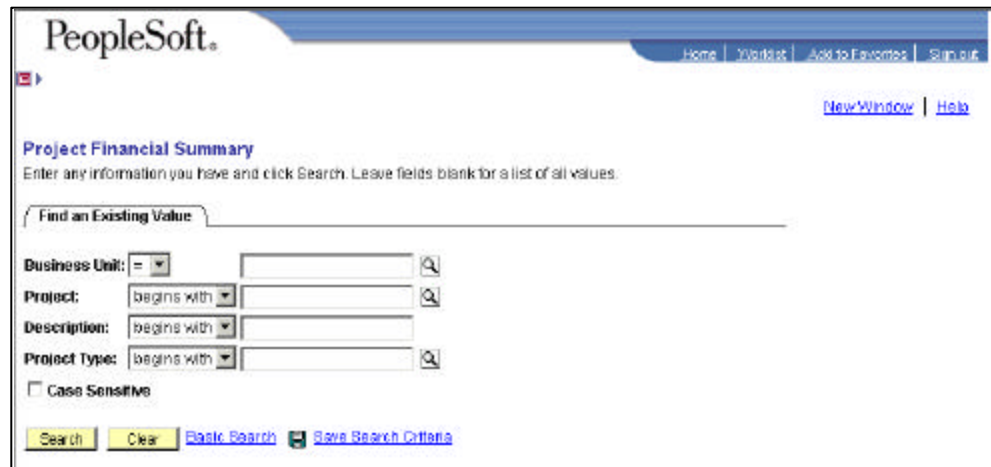
**NOTE:** The following pages on Analyzing Projects in PeopleSoft are best used when you want a quick, online summary of your projects' transactions for a period of time, such as monthly, quarterly, or yearly. If you prefer to track transactions on a daily or weekly basis, or if you want more detailed information, you may follow the navigation and instructions beginning on page 75 of your Projects Manual. You can also view the detailed items by going to the [Project General](#) page of a specific Project, click on [Project Activities](#) then click the [Resources](#) hyperlink for the Activity ID you wish to view. Then continue the instructions on page 77.

## VIEWING RESOURCES BY ANALYSIS TYPE

The Project Financial Summary enables you to analyze a project's resources online.

### Navigation

- Projects
- Review Costs
- Summarize by AnalysisType



PeopleSoft. Home | MyList | Add to Favorites | Sign out

[New Window](#) | [Help](#)

**Project Financial Summary**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

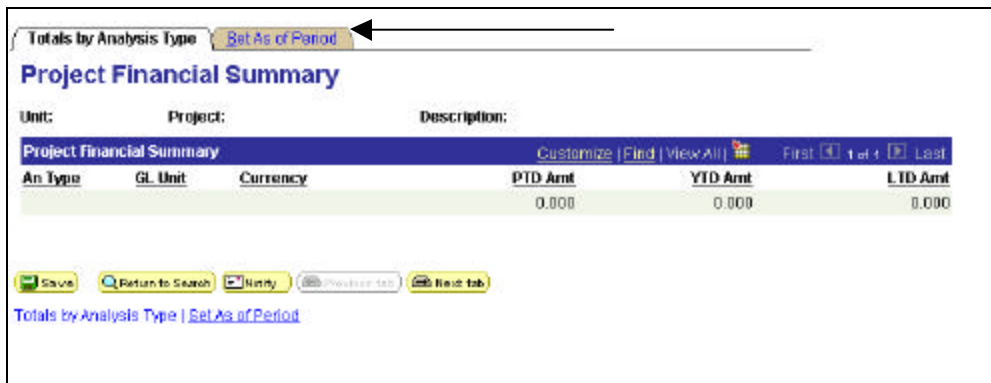
Find an Existing Value

Business Unit: [dropdown] [text] [magnifying glass]  
 Project: [begins with] [dropdown] [text] [magnifying glass]  
 Description: [begins with] [dropdown] [text] [magnifying glass]  
 Project Type: [begins with] [dropdown] [text] [magnifying glass]

☐ Case Sensitive

[Search] [Clear] [Blank Search](#) [Save Search Criteria](#)

Enter your business unit and project you wish to view. Click the [Search](#) button, and it will bring you to this screen, with your agency's project information listed:



Totals by Analysis Type [Set As of Period](#)

**Project Financial Summary**

Unit: Project: Description:

Project Financial Summary					
An. Type	GL Unit	Currency	PTD Amt	YTD Amt	LTD Amt
			0.000	0.000	0.000

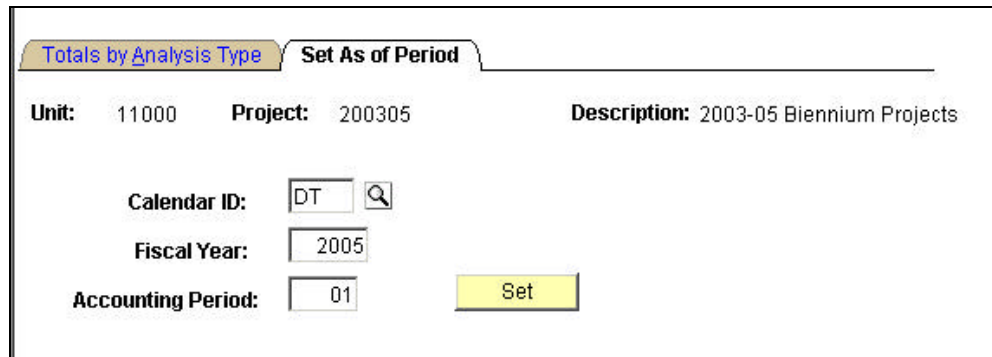
Customize | Find | View All | First | 1 of 1 | Last

[Save] [Return to Search] [Notify] [Previous tab] [Next tab]

[Totals by Analysis Type](#) | [Set As of Period](#)

To view the Project Financial Summary data, you must set the “As of Period” first. The Set As of Period enables you to select a time period to review.

In the example below, we chose to use Fiscal Year as the Calendar ID, and we want to view the resources for July 2004:

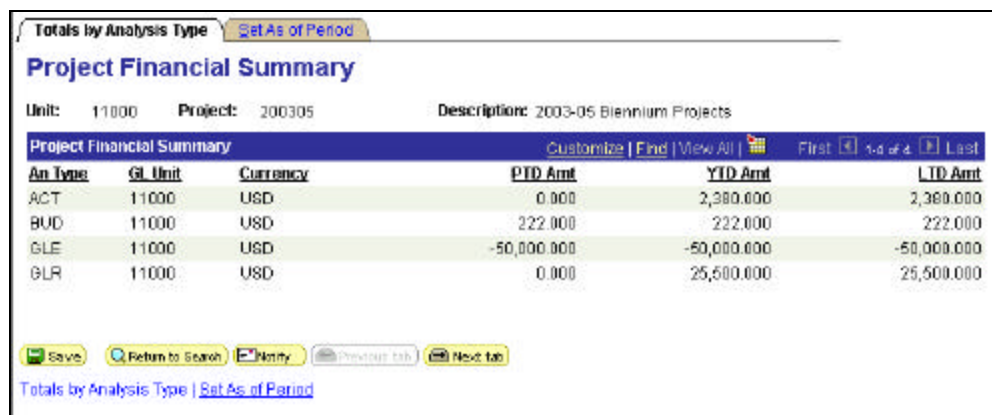


The screenshot shows the 'Set As of Period' tab with the following fields:

- Unit:** 11000
- Project:** 200305
- Description:** 2003-05 Biennium Projects
- Calendar ID:** DT (with a search icon)
- Fiscal Year:** 2005
- Accounting Period:** 01
- Set** button

Click the “SET” button.

Click on the “Totals by Analysis Type” tab, and you will pull up any resources that fit these criteria:



The screenshot shows the 'Totals by Analysis Type' tab with the following table:

Project Financial Summary					
Unit	Project	Description	PTD Amt	YTD Amt	LTD Amt
11000	200305	2003-05 Biennium Projects			
ACT	11000	USD	0.000	2,380.000	2,380.000
BUD	11000	USD	222.000	222.000	222.000
GLE	11000	USD	-50,000.000	-50,000.000	-50,000.000
GLR	11000	USD	0.000	25,500.000	25,500.000

Below the table are buttons: Save, Return to Search, Print, Download tab, Next tab. At the bottom, there are links: Totals by Analysis Type | Set As of Period.

PTD = Period to Date; YTD = Year to Date; LTD = Life to Date

The Project Financial Summary component groups resources by analysis type, not by analysis group.

Click **SAVE** if you wish to view this summary again.

## VIEWING RESOURCES BY RESOURCE TYPE AND/OR CATEGORY

The Project Resource Summary page shows summary amounts by resource type and category. You will only need to use this function if your agency uses resource types in Projects.

### Navigation

- Projects
- Review Costs
- Summarize by Resource Category

### Project Resource Summary

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Business Unit:

Project:

Description:

Project Type:

☐ Case Sensitive

[Basic Search](#)

Enter your business unit and project you wish to view. Click the  button, and it will bring you to this screen, with your agency's project information listed:

Totals by Resource Type

Set As of Period

Project Financial Summary

Unit: 11000

Project: 200305

Description: 2003-05 Biennium Projects

Project Resource Summary

[Customize](#) | [Find](#) | [View All](#)

First

1-9 of 9

Last

An Type	Res Type	Category	GL Unit	Currency	PTD Amt	YTD Amt	LTD Amt
ACT			11000	USD	0.000	100.000	100.000
ACT	001		11000	USD	0.000	1,590.000	1,590.000
ACT	002		11000	USD	0.000	540.000	540.000
ACT	10		11000	USD	0.000	150.000	150.000
BUD			11000	USD	222.000	222.000	222.000
GLE			11000	USD	-50,000.000	-50,000.000	-50,000.000
GLE	001		11000	USD	0.000	0.000	0.000
GLR	001		11000	USD	0.000	15,500.000	15,500.000
GLR	002		11000	USD	0.000	10,000.000	10,000.000

Save

Return to Search

Notify

Previous tab

Next tab

Again, you may change the fiscal period you wish to view by going to the “Set As of Period” tab and entering variables to narrow the search.

If you want to group the items on the screen by resource type, just click on the heading “Res Type”, and the program will sort the items in resource type order for you.

Click **SAVE** if you wish to view this summary again.

## FLEXIBLE ANALYSIS DRILLDOWN

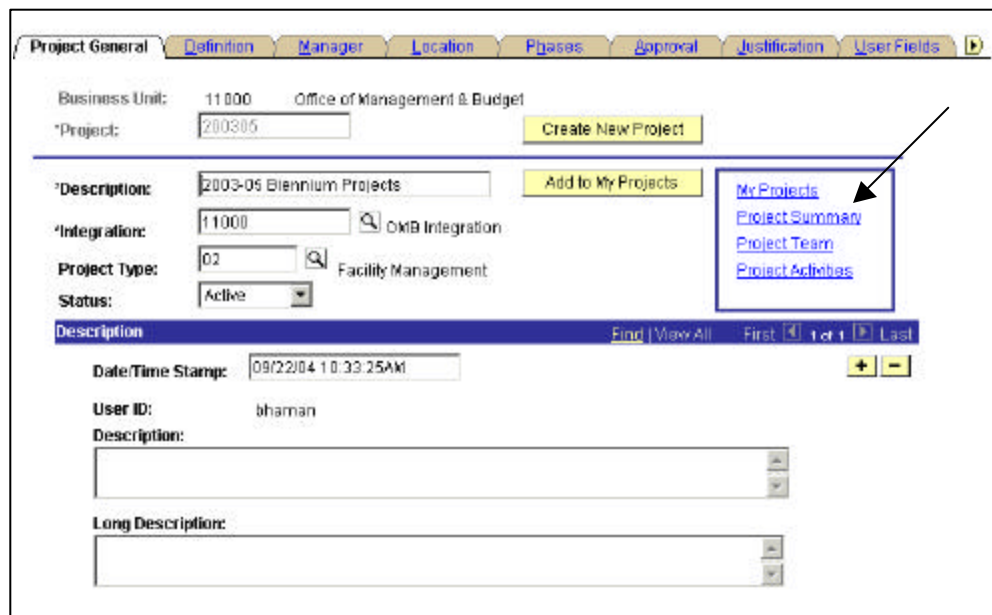
Flexible analysis is a method of analyzing a project's costs at these levels:

- Project
- Activity
- Resource
- Resource Category
- Resource Subcategory

The [Project Summary](#) page allows you to perform flexible analysis on your project(s) based on user-definable requirements. In order to perform analysis, you must first set up one or more templates.

### Navigation

- Projects
- Projects
- General Information
- Projects General (of chosen project)



When you click on the blue hyperlink for [Project Summary](#), it will take you to this page:

**Project Summary**

Unit: 11000 Project: 200305 Description: 2003-05 Biennium Projects

**Project Summary Information**

Project Type: 02 Facility Management

Project Manager:

[Project Status:](#)

% Complete:

Project Details: [Project General](#)

Activities: [Project Activities](#)

Budgets: [Project Budgets](#)

Resources: [Project Resources](#)

Description:

**Schedule Summary**

Early Start Date:

Early Finish Date:

Actual Start:

Actual Finish:

Baseline Start:

Baseline Finish:

Customize | Find | View All | First 1 of 1 Last

Do Flexible Analysis Drilldown

[Flexible Analysis Configuration](#)

[Return to Project General](#)

Return to Search Notify

## PROJECT SUMMARY PAGE

Explanation of some of the blue hyperlinks:

<b>Project Status</b>	Link to the Project Status page (if used)
<b>Project General</b>	Link to the Project General page for this project
<b>Project Activities</b>	Link to the Project Activities page for this project
<b>Project Budgets</b>	Link to Budget Scenarios already set up
<b>Project Resources</b>	Link to view a Resources report for the Activity ID's of this project.

To create a template, or edit an existing template, that you can use to analyze resource transactions defined within a project, first click the [Flexible Analysis Configuration](#) link as shown above.

### CREATE A NEW TEMPLATE

Only those templates created under your user ID are available to you. If there are no templates available, the system will automatically bring you to the Create New Template page.

### Create New Template

User: bhaman

---

Unit: 11000      Template:       SetID: SHARE

\*Description:

**Flexible Analysis Template**      [Customize](#) | [Find](#) | [View All](#) |      First 1 of 1 Last

Number	Analysis Group	Field Heading		
<input type="text" value="1"/>	<input type="text"/>	<input type="text"/>		

[Return To Flexible Analysis](#)

Save    Notify

Give the template a short description name in the "Template" field that will identify the type of report you are creating, with a longer name in the "Description" field. Click on the magnifying glass under "Analysis Group" to select the analysis groups you wish to view. Below is an example of the most common analysis groups. However, you may choose as few as "ACT" and "BUD" if you just want to track expenses quickly. Once you have chosen the analysis groups you want and given this template a name and description, click **SAVE**.

### Create New Template

User: bhaman

---

Unit: 11000      Template:       SetID: SHARE

\*Description:

**Flexible Analysis Template**      [Customize](#) | [Find](#) | [View 4](#) |      First 1-6 of 6 Last

Number	Analysis Group	Field Heading		
<input type="text" value="1"/>	ACT	Actual Cost		
<input type="text" value="2"/>	BUD	Budgets		
<input type="text" value="3"/>	COM	Commitments		
<input type="text" value="4"/>	GL	GL Analysis Types		
<input type="text" value="5"/>	REQ	Requisitions		
<input type="text" value="6"/>	REV	Revenue		

[Return To Flexible Analysis](#)

Save    Notify

Click on [Return To Flexible Analysis](#), and it will bring you to the following screen:

### Flexible Analysis Configuration

**User ID:** bhaman  
**Name:** Bev Haman  
**Unit:** 11000

Current User Default Template

<b>Flexible Analysis Template:</b>	BEVSTEST	Testing BUD Activity
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Change Default Template

Edit Template

Create New Template

[Return to Project Summary](#)

Save

Notify

The name of your template should show up here. **NOTE:** If a template has already been saved, the system will take you to this screen rather than the “Create New Template” screen. You then have four options:

- Click [Return to Project Summary](#) to use this template;
- Edit this saved template;
- Change the default template shown to another; or
- Create a new template by pressing that button and following the directions above.

To use the chosen configuration template, click on [Return to Project Summary](#) and you will return to the Project Summary screen.



**Project Summary**

Unit: 11000 Project: 200305 Description: 2003-05 Biennium Projects

**Project Summary Information**

Project Type: 02 Facility Management

Project Manager:

Project Status:

% Complete:

Project Details: [Project General](#)

Activities: [Project Activities](#)

Budgets: [Project Budgets](#)

Resources: [Project Resources](#)

Description:

**Schedule Summary**

Early Start Date:

Early Finish Date:

Actual Start:

Actual Finish:

Baseline Start:

Baseline Finish:

**Flexible Analysis Cost Summary: User Template: BEVSTEST** [Customize](#) | [Find](#) | [View All](#) | [First](#) | [1 of 1](#) | [Last](#)

Actual Cost	Commitments	GL Analysis Types	Revenue	Budgets
<a href="#">Do Flexible Analysis Drilldown</a> <a href="#">Flexible Analysis Configuration</a> <a href="#">Return to Project General</a>				

[Return to Search](#) [Notify](#)

Press the “Do Flexible Analysis Drilldown” button, and the following screen will appear:

**Project Summary**

Unit: 11000 Project: 200305 Description: 2003-05 Biennium Projects

**Project Summary Information**

Project Type: 02 Facility Management

Project Manager:

Project Status:

% Complete:

Project Details: [Project General](#)

Activities: [Project Activities](#)

Budgets: [Project Budgets](#)

Resources: [Project Resources](#)

Description:

**Schedule Summary**

Early Start Date:

Early Finish Date:

Actual Start:

Actual Finish:

Baseline Start:

Baseline Finish:

**Flexible Analysis Cost Summary: User Template: BEVSTEST** [Customize](#) | [Find](#) | [View All](#) | [First](#) | [1 of 1](#) | [Last](#)

Project ID	Actual Cost	Commitments	GL Analysis Types	Revenue	Budgets
<a href="#">200305</a>	\$-47,620.00		\$-75,500.00		\$15,227.00

[Do Flexible Analysis Drilldown](#) [Flexible Analysis Configuration](#) [Return to Project General](#)

[Return to Search](#) [Notify](#)

This screen shows you the totals for this project for the analysis groups you chose. If you wish to see the breakdown by Activity ID, click on the blue hyperlink of the Project ID as shown above. Then the following screen will appear:

200305

Flexible Analysis Cost Summary: User Template : BEVSTEST [Customize](#) | [Find](#) | [View All](#) | [First](#) | [1 of 5](#) | [Last](#)

Activity ID	Actual Cost	Commitments	GL Analysis Types	Revenue	Budgets
<a href="#">01</a>	\$-48,470.00		\$-55,000.00		\$14,222.00
<a href="#">02</a>	\$1,350.00		\$-10,000.00		\$5.00
<a href="#">03</a>	\$500.00		\$-500.00		
<a href="#">05</a>			\$-10,000.00		
<a href="#">BUD</a>					

[Do Flexible Analysis Drilldown](#)
[Flexible Analysis Configuration](#)
[Return to Project General](#)

[Return to Search](#)
[Notify](#)

If your agency uses budgets in Projects, that information will show on this screen also. When you are done, you can return to Project General using the blue hyperlink or "Return to Search."